THOMSON REUTERS LEGAL TRACKER

USER GUIDE

TRACKER FOR OUTLOOK

Document Version 2022-1

THOMSON REUTERS®

INTRODUCTION

Tracker for Outlook is an add-in that lets you quickly complete essential Tracker workflows right from within Outlook. Tracker for Outlook helps legal ops teams and busy attorneys get things done faster and more efficiently. You can get matters into Tracker faster, without even signing in to Tracker, and it's easy to set up.

Tracker for Outlook capabilities are designed to help legal counsel focus on activities that bring in business, and give legal ops teams the tools they need to conduct business.

- Attorneys can get matters into Tracker faster, providing only the essential details, without even signing in to Tracker.
- Legal ops professionals can start working with matters in Tracker sooner, open relevant matters faster, and copy documents straight from Outlook emails to Tracker matters without switching between applications.
- Invoice approvers can review and take action on pending invoices as soon as they receive a pending invoice notification email from Tracker, without leaving the Outlook reading pane.

This guide is recommended for Tracker users who want to learn more what Tracker for Outlook can do and how to begin using it, and for current add-in users who want to take advantage of its full capabilities.

FEATURES

- Drag and drop Outlook email messages, attachments, documents, and other files to Legal Tracker matters from the familiar Outlook interface, leaving the original email intact, without having to sign in to Tracker. Emails and attachments can be prioritized and copied to Legal Tracker matters, leaving the original email intact. These items can be renamed, and folders, sharing permissions, and review settings can be assigned before saving to Tracker.
- Review open matters and find matters that need attention in a few clicks. Email relevant parties with just one click. Get a quick look at a matter without having to sign in to Tracker.
- Create a matter in Tracker without having Tracker open. There is no need to wait for attorneys to request matter creation.
- Copy emails and documents to matters not yet created in Tracker.
- Find and clone a matter without leaving Outlook or opening Tracker. Eliminates the need to sign in to Tracker, locate the similar matter, and complete the clone.

- Review, approve, or reject pending invoices based on inbound email notifications, or all pending invoices that meet quick-approve requirements. You can quick-approve invoices while still looking at the email notification in Outlook, without opening Tracker or quick-approve all pending invoices while checking you email.
- Quickly review, approve or reject pending invoices without leaving the Outlook reading pane.

GET HELP

Tracker Support or your Client Success Manager

- Getting the add-in if your company isn't using it yet
- Enabling add-in languages

Tracker Coordinator or Company System Administrator

- Enabling add-in document support
- Help signing in for the first time

INSTALLING TRACKER FOR OUTLOOK

The Tracker for Outlook add-in lets you quickly complete essential Tracker workflows from within Outlook. Once you enable the integration, you can copy Outlook email messages, attachments, documents, and other files to Legal Tracker matters from Outlook, review matters, and create matters.

Tracker for Outlook users need:

- A Tracker account
- An Outlook account (Office 365 or Outlook 2013 or later)

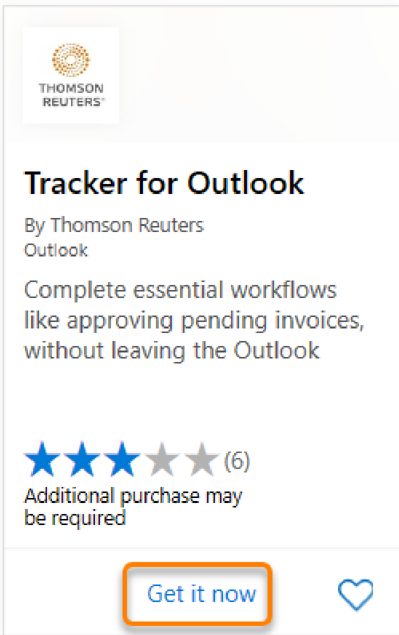
Your company needs to have Thomson Reuters turn on Tracker add-ins for your company. Next, your System Administrator or Tracker Coordinator can enable the integration and install and set up the add-in.

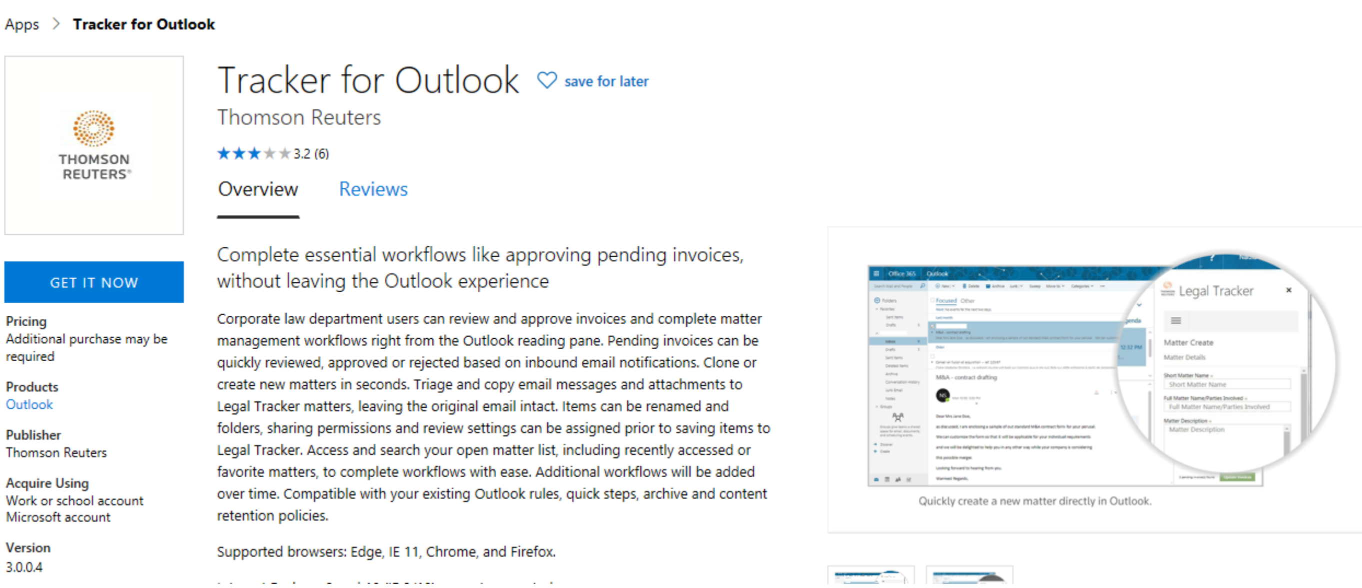
ENABLE OUTLOOK INTEGRATION

1. From Tracker, click **Settings** in the left navigation
2. Under **Integrations** select **Other Integration Features**.
3. Next to **Outlook add-in** check **Yes**.

GET THE ADD-IN

Tracker for Outlook works across desktop Outlook for Windows and Mac, as well as Office 365 and Outlook.com. To find the add-in, go to Microsoft AppSource. This step is typically done by your company's IT department to ensure no company security policies prevent the add-in from working correctly.



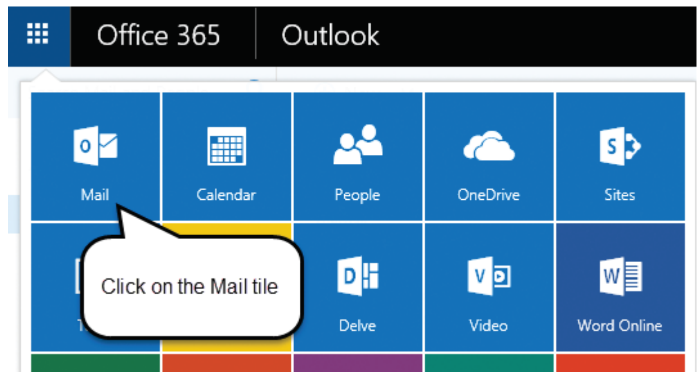
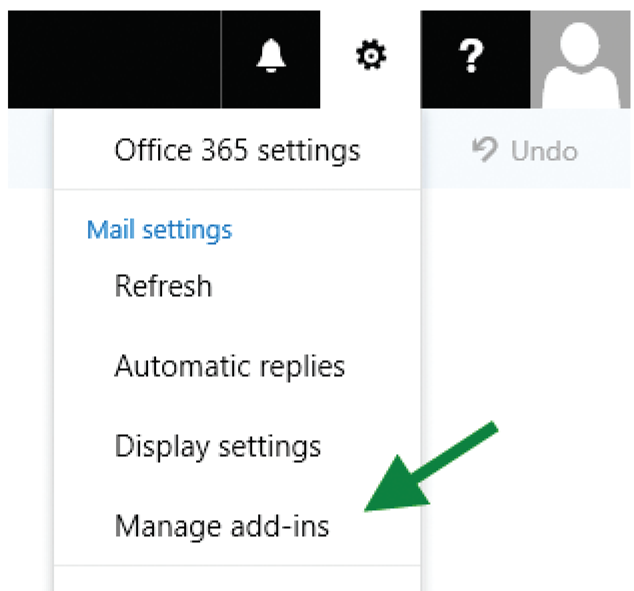


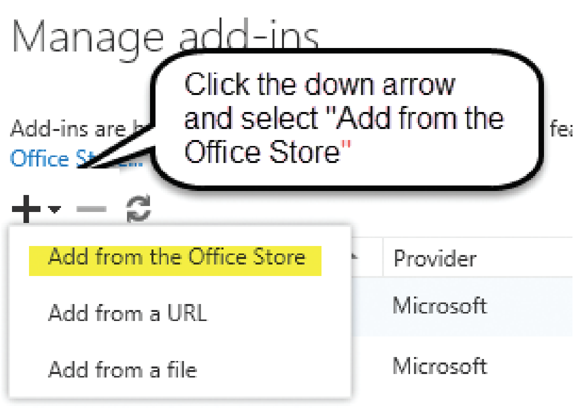
Tip | Your company needs to have Thomson Reuters turn on Tracker add-ins for your company. If you want to start using the add-in but your company hasn't enabled it yet, contact your Tracker Coordinator, Tracker Support, or your Client Success Manager.

Tracker for Outlook users need:

- A Tracker account
- An Outlook account (Office 365 or Outlook 2013 or later)

INSTALL THE ADD-IN (INDIVIDUAL)

1. Sign into Office 365™.	
2. In the Office 365 Application Launcher, click the Mail tile.	
3. From the Setting menu (Gear icon) click Manage add-ins.	

<table>
<tr>
<td>4. From the Manage add-ins page, click the down arrow.</td>
<td>
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<tr>
<td colspan="2">5. The Office Store opens. Search for the Tracker for Outlook Add-in and select it.</td>
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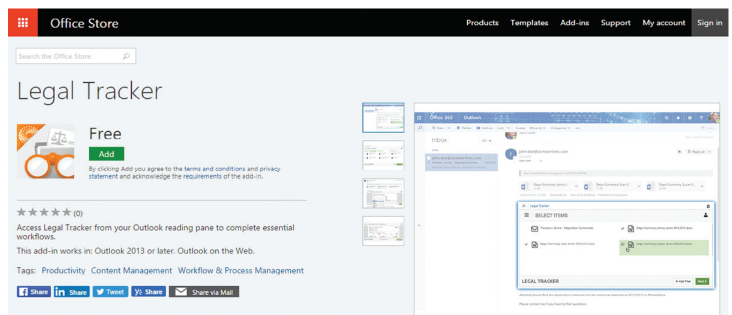
<tr>
<td>6. Click the Add button.</td>
<td>
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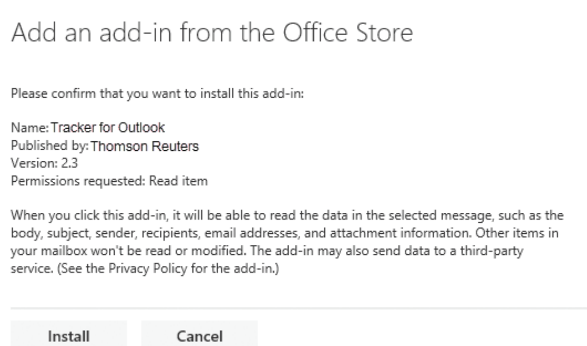
<tr>
<td>7. On the pop-up that appears, click Install.</td>
<td>
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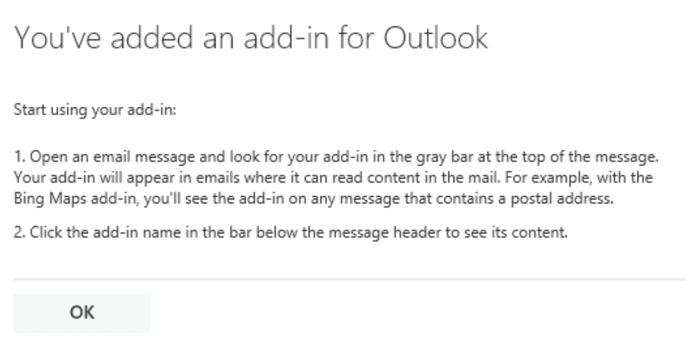
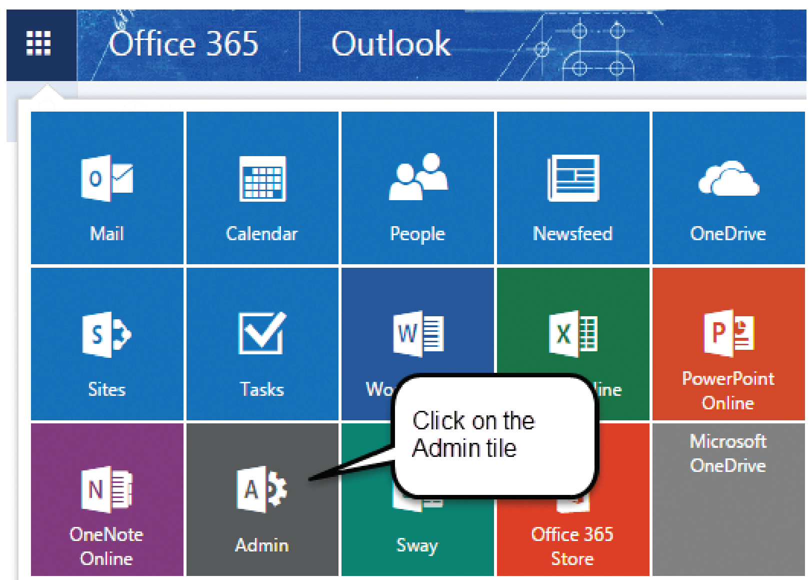
8. When the installation finishes, a confirmation page appears. Click the **OK** button.

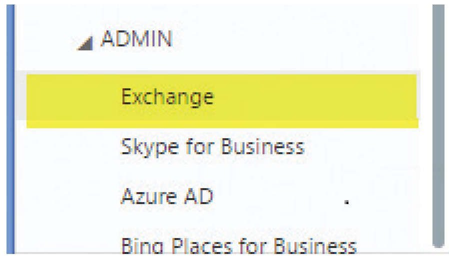


You're ready to begin using Tracker for Outlook. Open the Application Launcher and return to Mail.

COMPANY INSTALLATION (ENTERPRISE)

1. Sign into Office 365™ as an administrator
2. In the Office 365 Application Launcher, click the Admin tile.



<table>
<tr><td>3. Click the Exchange category on the left navigation list</td><td>
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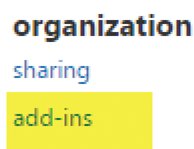
<tr><td>4. On the Exchange admin center page, under the Organization section, click the Add-ins link.</td><td>
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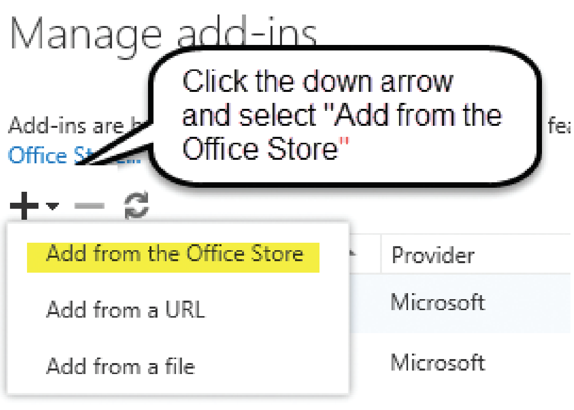
<tr><td>5. From the Manage add-ins page, click the down arrow.</td><td>
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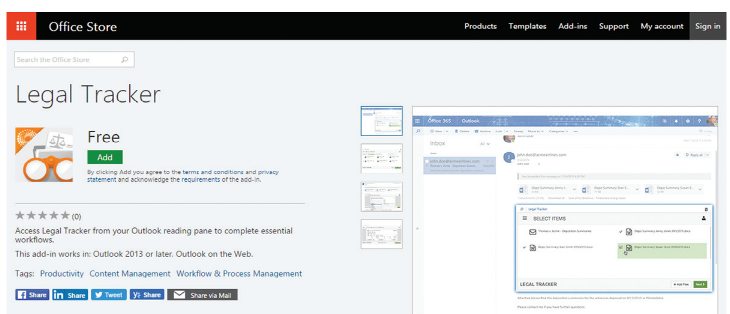
<tr><td>7. Click the Add button.</td><td>
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<tr><td>8. On the pop-up that appears, click Yes.</td><td>
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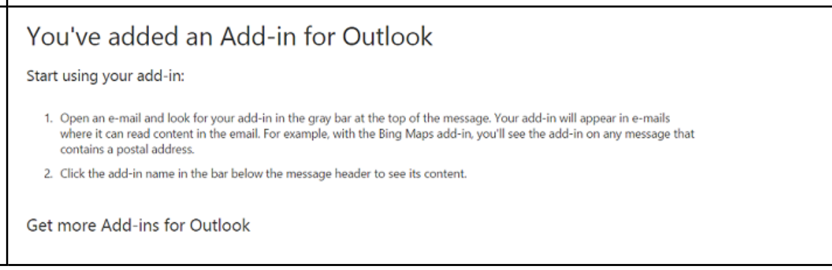
<tr><td>9. When the installation finishes, a confirmation page appears.</td><td>
</td></tr>
<tr><td colspan="2">10. Close the tab and return to the Exchange admin center page.</td></tr>
</table>

Depending on your settings, the add-in may be enabled for all users, or disabled for all users.

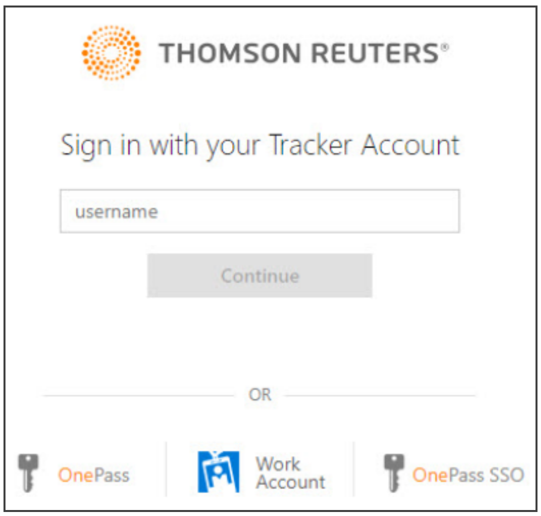
You're ready to begin using Tracker for Outlook. Open the Application Launcher and return to Mail.

TRACKER FOR OUTLOOK | SIGNING IN

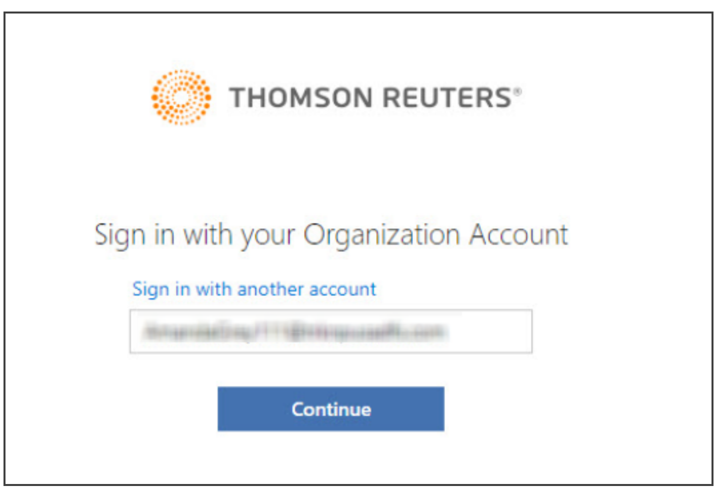
To use Tracker for Outlook, you use the same credentials you use to sign in to Tracker. If you have a OnePass account, you use the same OnePass credentials you use to log on to Tracker.

1. Click the Tracker icon in the Outlook reading pane.

2. Sign in using your Tracker credentials. Type your user name in the field and click **Continue**, *or* select **OnePass** or **OnePass SSO** to log in using your OnePass account.



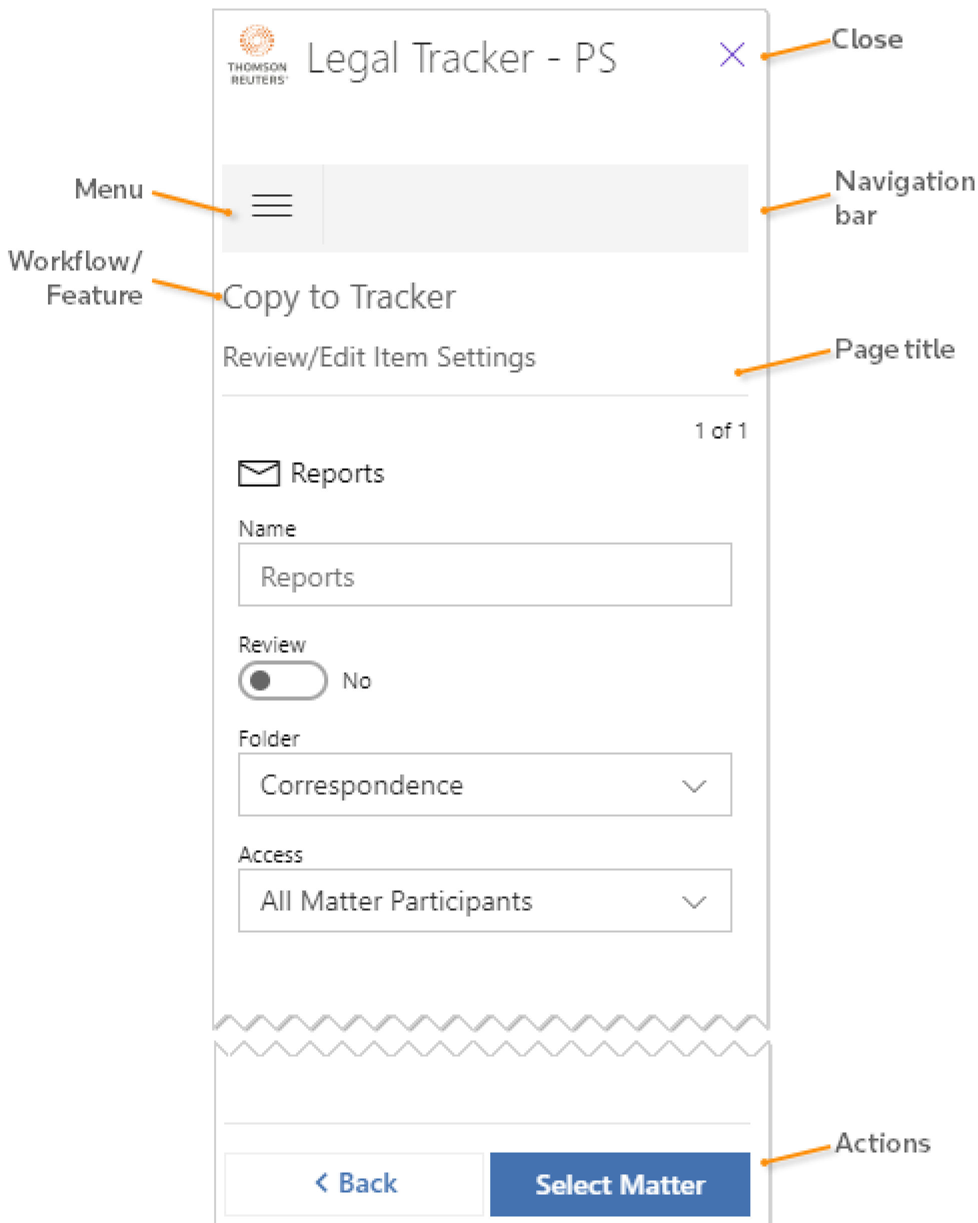
3. If you use OnePass, sign in with your



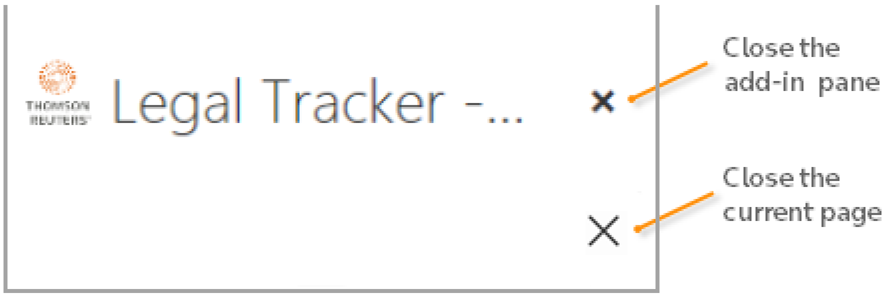
BASICS

TRACKER FOR OUTLOOK INTERFACE

It's a good idea to familiarize yourself with some basic navigation elements and where to find the **Menu** icon, **Close** icon, **Navigation bar**, **Workflow/Feature**, and **Page title** before you use Tracker for Outlook for the first time.



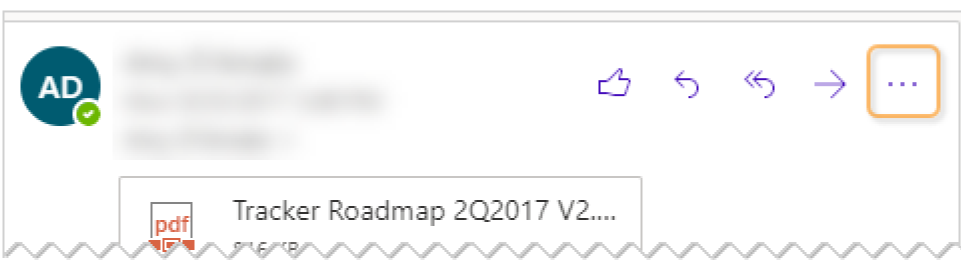
Some pages in the add-in have a Close icon on the add-in navigation bar. Don't confuse it with the Close icon at the top of the add-in pane. Click the Close icon on the add-in navigation bar to close the current page and return to the last add-in page you were using.



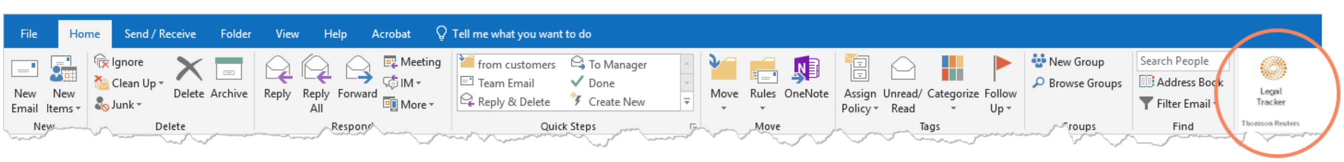
OPEN THE ADD-IN

1. Click the Tracker icon in your version of Outlook:

    - **In Office 365** Open an email, then click the three small dots in the reading pane.

    - **On the Desktop (Outlook for 2013 or later)** Click the Tracker icon on the Outlook ribbon.

    Tip | If you don't see the Tracker icon in your Outlook reading pane or on the Outlook ribbon, the add-in may not be installed for your company. See [Installing Tracker for Outlook (page 3)].

2. When prompted, sign in with your Tracker credentials.

3. The Copy to Tracker workflow opens automatically when you sign in. To complete a different add-in activity or workflow, click the Menu icon in the add-in pane.

CLOSE THE ADD-IN

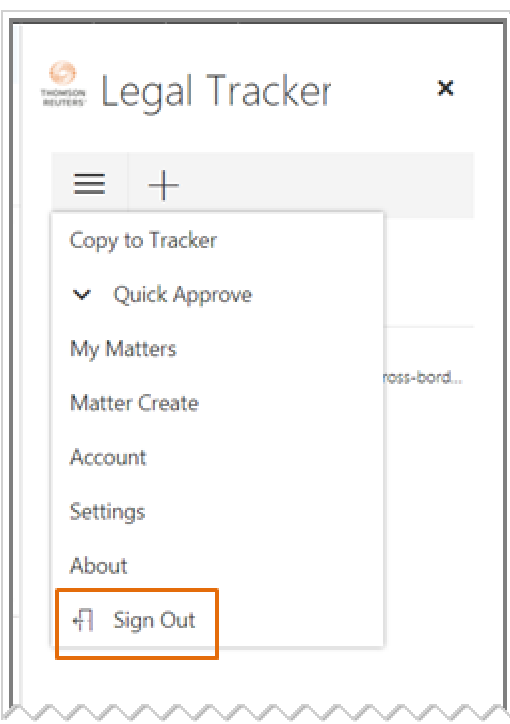
Close and Stay Signed In

To close the add-in without signing out, click the add-in pane Close icon. When you open the add-in again you will still be signed in, unless your system automatically signed you out due to inactivity.

The system automatically signs you out of the add-in after 30 minutes of no activity in the add-in. Any work that you haven't saved will be lost. When you return to the add-in after automatic sign out, you need to sign in again and start with the default workflow.

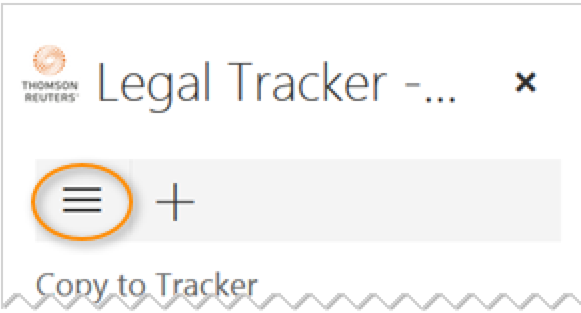
Close and Sign Out

To close the add-in and sign out, click the add-in Menu icon, and then select **Sign Out**. When you next open the add-in, you will need to sign in again.



THE ADD-IN MENU

The menu is where you'll select Tracker workflows and other add-in actions to complete.



Menu options

MENU OPTION	WORKFLOW/ACTION
Copy to Tracker	Copy emails, attachments, documents, and other files to Tracker matters.
Quick Approve	Approve, reject, or dispute invoices that are eligible for one-click approval.
My Matters	Find matters, review matter card details, or clone existing matters.
Matter Create	Quickly create a matter in Tracker.
Account	Review your Tracker user account information and the default settings for Matter Create.
Settings	Review or update your add-in user account preferences, such as language, date format, and number format.
About	See what version of the add-in you're using or review the Legal Tracker Privacy Policy.
Help	Get add-in-specific help content without signing in to Tracker.
Sign Out	Sign out from the add-in (does not sign you out of Outlook or Tracker).

PERSONALIZING TRACKER FOR OUTLOOK

By default, Tracker for Outlook uses your personalization settings from Tracker, but you can set personal preferences for settings such as the number and date formats or the language you want to use with Tracker for Outlook. Changing your settings in Tracker for Outlook does not affect your personalization settings in Tracker.

UPDATE YOUR PREFERENCES

To set your add-in language, date, and number preferences:

1. In the add-in pane, click the Menu icon, and then select **Settings**.
2. In Settings, use the drop-down lists to set your preferences.

LANGUAGE	The add-in supports the following languages: • English-US • English-UK • French-FR • Italian-IT • Spanish-SP • Japanese-JP The add-in language selection affects field labels and menu options, but user-entered text is not translated. Also note that add-in languages are not part of Legal Tracker language pack subscriptions. There is no additional charge for these out-of-the-box add-in languages. However Company Outlook add-in languages must be turned on. If you don’t see the Language option in Settings, the Tracker for Outlook language option may not be turned on for your company. This must be done by a Tracker Admin. Please reach out to your Tracker Coordinator, Tracker Support, or your Client Success Manager for assistance.

DATE FORMAT	You can choose from the following date formats. • mm/dd/yyyy • dd/mm/yyyy • dd-mmmm-yyyy • mmmm-dd-yyyy
NUMBER FORMAT	You can choose from the following number formats. • 1,234.56 • 1.234,56 • 1’234.56 • 1 234.56

3. Click **Save**.

TRACKER SETTINGS THAT AFFECT ADD-IN WORKFLOWS

Because the workflows you complete in the add-in update the data you work with in Tracker, it’s important to understand how the following Tracker settings affect the add-in experience.

Default Tracker Document Folder

If your company has set a default email folder, Tracker for Outlook saves documents to that folder, unless you change it by selecting a different folder in the add-in pane. We recommend that you find out what your default email folder is so you know where documents that you copy from the add-in are stored in Tracker.

User Profile and Template Settings

Matters you create from the add-in have a set of default values, most of which you can change in Tracker later. It’s a good idea to review these defaults so you understand what details are associated with add-in matters in Tracker and what you might want to update in Tracker after the matter is created.

The following Matter Create default values are set up in the user’s Tracker profile. (Typically, the Company System Admin sets these values). Matters the user creates in Tracker for Outlook inherits values by default, but they can be updated in Tracker after matter creation.

- Substantive Law
- Practice Group
- Org Unit
- Invoice Approval Route
- AP Route

Matter Create Defaults

The following Matter Create default values are set by Tracker for Outlook based on the add-in matter template.

TEMPLATE ELEMENT	MATTER ATTRIBUTE
Matter Type	Outlook Add-in (can't be changed)
Matter Status	Open
Apply Conditional Fields	No (conditional logic is not supported for add-in matters)
Does Matter Belong to Group?	No
Access Security	All Matter Participants
Firm Access	Internal
Matter Functionality	Full
Start Date	Date matter was created in add-in
Lead Co Person	Tracker user who created the matter in the add-in
Country	Same as country in Tracker Miscellaneous Matter Options

TRACKER FOR OUTLOOK | ESSENTIAL WORKFLOWS

Users can complete essential workflows, such as matter creation, invoice approval, and matter document management, all from within the familiar Microsoft Outlook email application. In this section we take you step by step through each of the core add-in workflows.

COPY TO TRACKER

Copy to Tracker is a popular feature in Tracker for Outlook. Use it to copy Outlook emails, attachments, and other files to Tracker without leaving the Outlook reading pane.

General Information

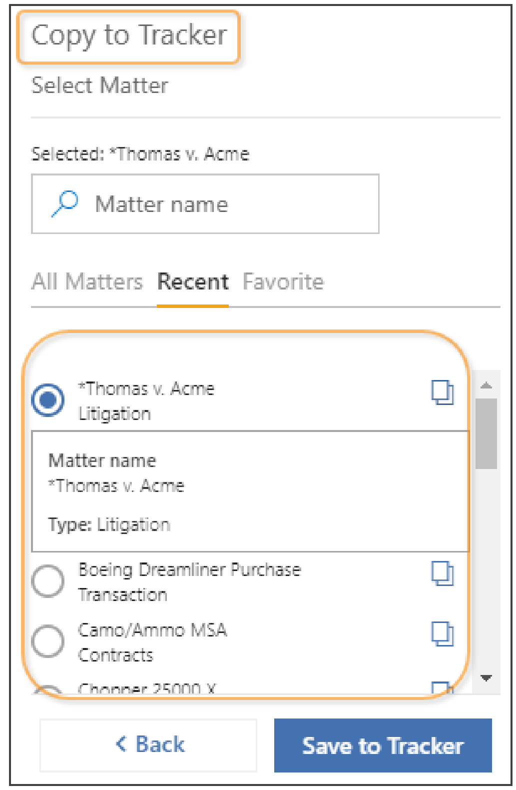
- You can copy one email to Tracker at a time.
- Emails with other emails attached cannot be copied to Tracker because the attached emails can't be evaluated or scanned for viruses.
- You can copy up to 20 files to Tracker at a time.
- Files are scanned for viruses and not copied if a virus is detected.
- The combined size of the files must be less than 50MB.
- Certain file types cannot be copied to Tracker. The most common prohibited file types are .js, .exe, .bat, .dll, .cmd, .msi, .ps1, and .pst.

Workflows

Select Copy to Tracker

1. In Outlook, select the email that you want to copy, or that has attachments you want to copy. If you're only adding files from your computer, select any email.

2. Click the Tracker icon to open the add-in pane. When you open the add-in, Copy to Tracker is already selected. (If you're already working elsewhere in the add-in, you can select **Copy to Tracker** from the add-in menu.) The selected email name and any attachments are listed in the add-in pane.



Select Items to Copy

Select items that you want to copy by using either of these methods, based on the types of items you want to copy.

To copy only emails or email attachments from the Outlook reading pane:

1. Check the box by each item you want to copy to Tracker. (A check box displays when you hover over an item.)
2. Click **Next** to go to Review/Edit Item Settings.

To copy other documents or files from your computer (with or without the selected email and attachments).

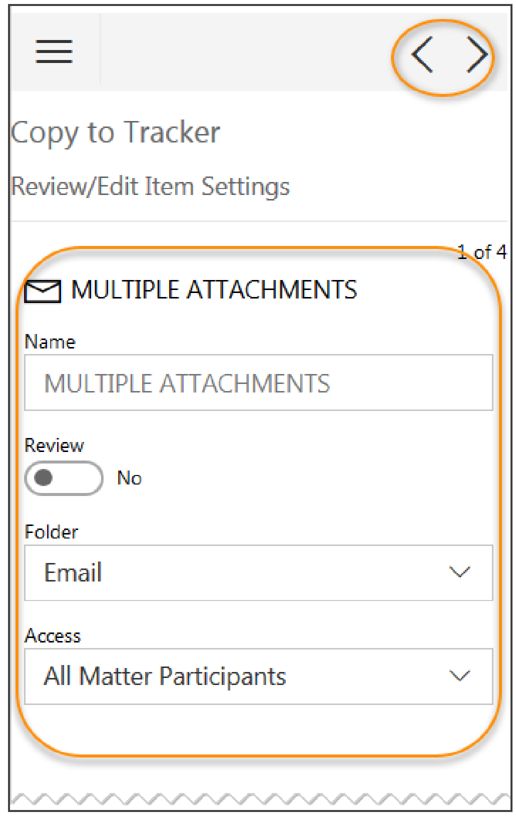
1. Click the Add Files icon .
2. Click **Select Items**, and then browse for files or drag and drop them directly to the add-in pane.
   - To browse: Use your file manager (for example Windows Explorer) to find and select one or more files.
   - To drag and drop: Drag and drop files from your file manager or desktop to the Add Files area.
3. Click **Done**.

Files from your computer may take longer to copy than emails.

4. Review the selected items list.
   - Files you select are automatically checked for inclusion in the copy.
   - Check the box by any email or attachment items you also want to include (optional).
   - This icon displays by any disallowed files. The reason is shown above the item list.
5. Click **Next** to go to Review/Edit Item Settings.

Review Document Settings

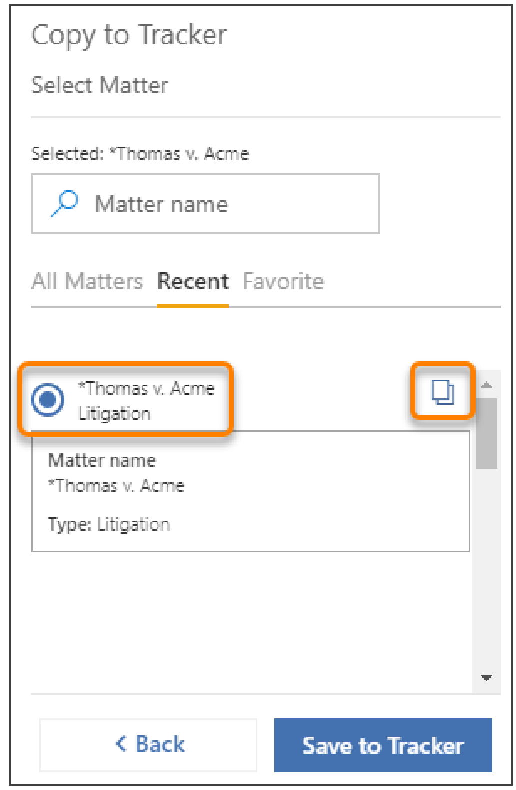
1. Review the default document settings and make changes as needed. Changes you make affect only the item that you see in the add-in pane.
    - **Name**: Defaults to the email subject
    - **Review**: Defaults to No (document review not required)
    - **Folder**: Defaults to the company's designated correspondence folder, typically Correspondence or Email
    - **Access**: Defaults to All Matter Participants



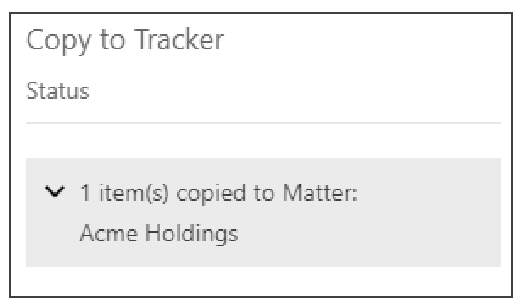
2. If you are copying more than one item, use the arrows on the add-in navigation bar to move between item settings for each item.
3. When you're done updating document settings for each item, click **Select Matter**.

Select a Matter

1. Each matter type tab is individually searchable. Find the matter you want to copy the items to by scrolling or searching the matter type tabs.
    - All Matters
    - Recent Matters
    - Favorites

2. Enter your search word in the search box, and then click the tab. Search considers matter short name, ID, and type/template. 3. Click a matter to select it. This icon indicates the selected matter. To ensure you select the correct matter, use the Matter Card icon by the matter name to see high-level matter details.	
4. Click **Save to Tracker**.	

Confirm Copy Details

On the Status page, confirm that the expected number of items was copied to the correct matter.	

Locate the copied items in Tracker

To find the items you copied in Tracker, use either of these methods:

- Sign in to Tracker and search for the matter that you added them to.
- In the add-in, use the My Matters workflow to find the matter you added them to, and then click **View** in Tracker. You'll find the copied items on the matter's Documents page in Tracker.

Update document profiles in Tracker

For items that you copy to Tracker by using the add-in, Tracker applies the following default values, which you can change in Tracker if you want:

- **Name:** The file name as saved. For email messages, this is the subject line, unless a name is specified in Review/Edit Items Settings. If multiple copies exist, Tracker appends (n) to the item name, where n is a sequential number for each duplicate name.
- **Document Type:** If the item type has a .msg extension, it will be set as an email in Tracker. All others are marked as a Document.
- **Document Date:** The date the item was copied to Tracker (files and attachments); for emails, this is the email date.
- **Description:** None
- **Author:** None
- **Access Security:** All Matter Participants
- **File Attachment:** List of attachments, if any
- **Allow File/URL to be Replaced:** No
- **Display in Document List in Matter:** Yes
- **Folder:** If the company has set a default correspondence folder, that folder is used as a default in the add-in.
- **Review Requested:** No

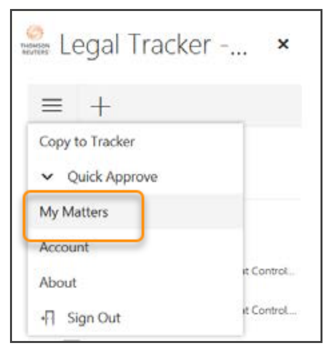
Due to a security constraint, the original document date and author are not copied to Tracker.

MY MATTERS

My Matters provides a quick path to review Tracker matters while you're working in Outlook. You'll find many of the matter profile details stored in Tracker on matter detail cards in the add-in, including related financial and firm information.

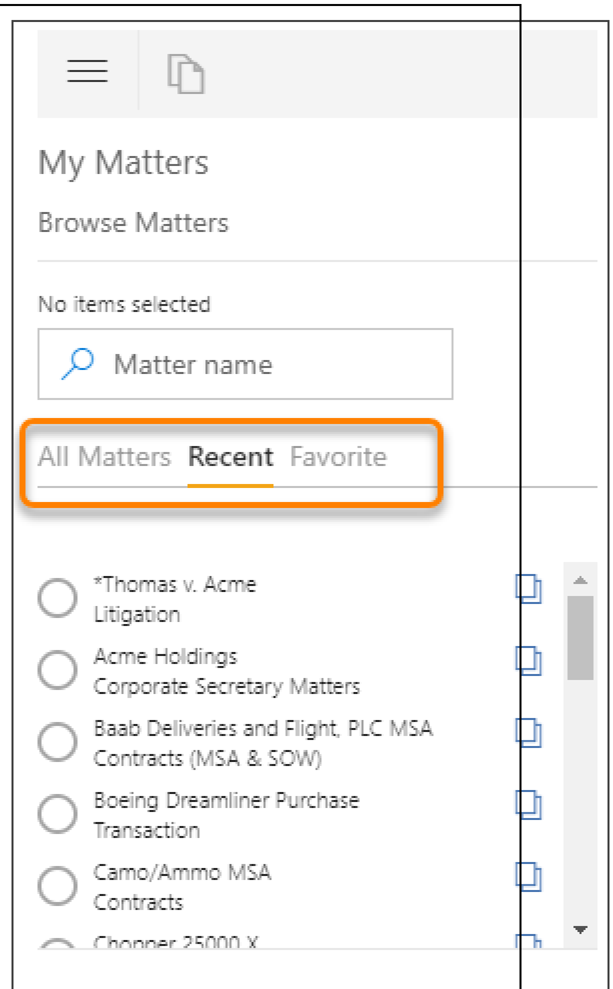
Workflow Guidance

Find a Matter

1. In Outlook, select the relevant email (or any email). 2. Click the Tracker icon to open the add-in pane.	
3. In the add-in pane, click the add-in Menu icon, then select **My Matters**.	

4. Find a matter by scrolling or searching the matter type tabs.
    - All Matters
    - Recent Matters
    - Favorites

Tip | Each matter type tab is individually searchable. Enter your search word in the search box, and then click the tab. Search considers matter short name, ID, and type/template.

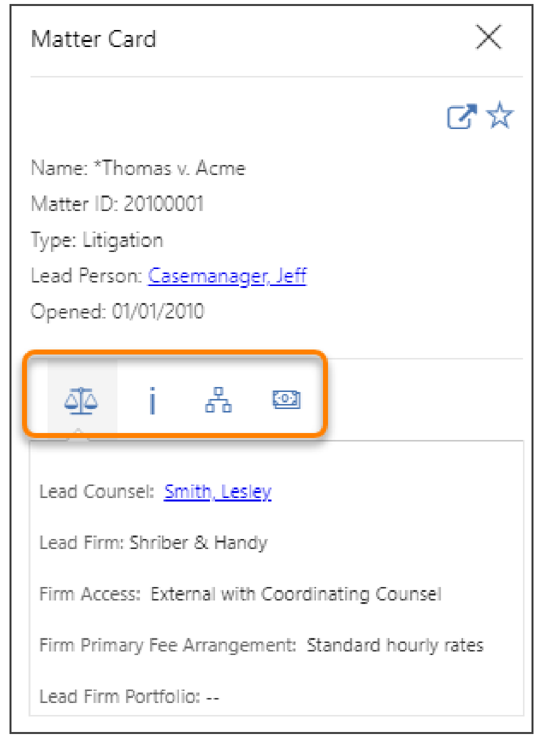


Review Matter Details

1. To see matter card details, click the Matter Card icon next to a matter in the All Matters, Recent, or Favorite list.

2. On the matter card, click the following icons to review other matter detail categories:

	Firm information
	More matter information
	Organization information
	Spend and budget

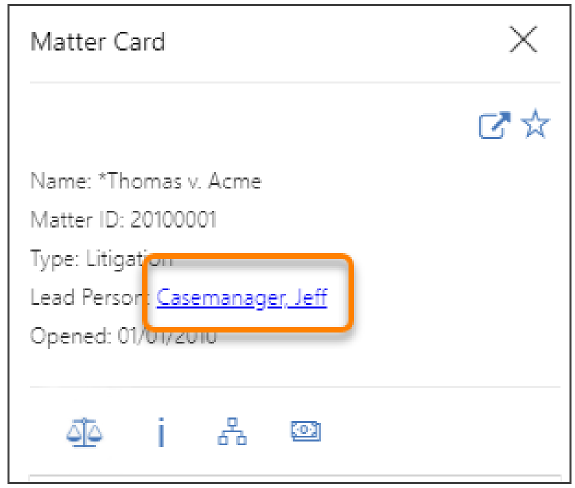


Favorite a Matter

Click the Favorite icon ☆ on the matter card to favorite a matter and add it to the add-in Favorite list. To remove a favorite, click the Favorite icon again.

Favorite matters are shown on the Favorite tab, and also on the All and Recent tabs where they are marked with an asterisk. Matters that you favorite and unfavorite in the add-in or in Tracker are always marked as such in both places.

Email the Lead Person or Lead Counsel

Click the name link on the matter card to email the matter's lead person from your default email application, or the name link in firm information details to email the firm's lead counsel.	

See a Matter in Tracker

Click the View in Tracker icon on the matter card and sign in to Tracker. Tracker takes you directly to the selected matter's profile.

Close the Matter Card

Click the Matter Card Close icon.

CREATE A MATTER

With Matter Create you can literally create matters in seconds, from the Outlook add-in pane. Only three fields are required. Matters created with the add-in are easily surfaced in Tracker, where you can add, update, and report on matter details as needed.

Matter Creation Requirements

- Matter Create access in Tracker is required.
- Matters that are created by using the add-in are based on a Tracker Outlook Add-in matter template, designed specifically for use with the add-in Matter Create feature, and available after the add-in is turned on.
- A Company System Admin or Tracker Coordinator must complete a quick, one-time setup of user profile add-in defaults for Tracker users who will use Matter Create.
- Matters are created with internal firm access, with the add-in user as Lead Company Person, and a few other default values from the add-in template. These settings can be updated in Tracker after matter creation.

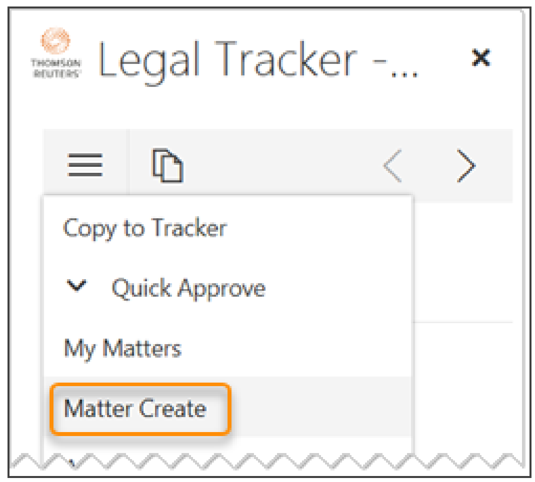
One-time user setup

Company System Administrators or Tracker Coordinators are responsible for setting a few default add-in matter values in Tracker for add-in users. To complete this one-time user profile setup step:

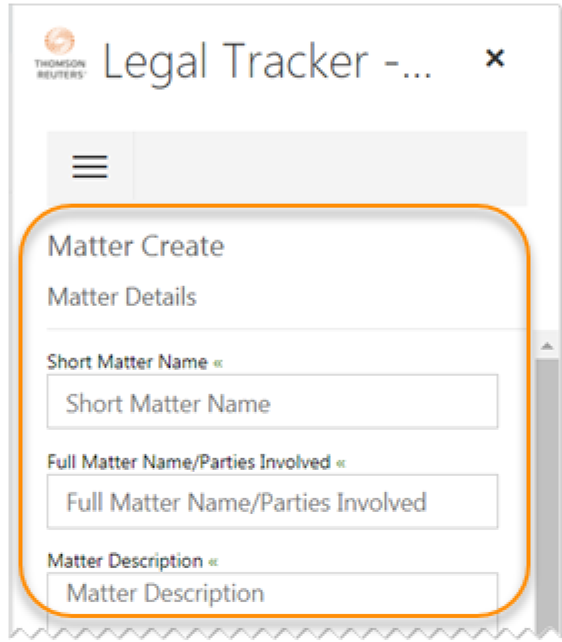
1. In Tracker, go to **Users > User List** in the left navigation.
2. Find and open the user profile.
3. In the Outlook Add-in Matter Defaults section, set the default values for matters that this user creates by using the add-in:
    - Substantive law
    - Practice group
    - Org unit
    - Invoice approval route
    - AP routing

Workflows

Create the Matter

1. In Outlook, select the relevant email (or any email). 2. Click the Tracker icon to open the add-in pane.	
3. In the add-in pane, click the Menu icon, and then select **Matter Create**.	

4. On the Matter Details page, complete the three required fields (indicated by chevron icons):
   - **Short Matter Name**
   - **Full Matter Name / Parties Involved**
   - **Matter Description**
5. Complete optional fields as needed:
   - **Matter ID** (depends on Tracker Misc Matter options)
   - **Matter Currency**



6. To review the default matter creation settings, click **Expand** below Matter Create Defaults. (Optional)
7. Click **Save to Tracker**.
8. On the Status page, confirm that the New Matter Created message displays. The new matter is immediately available in:
   - The add-in on the My Matters, All, and Recent tabs
   - The Tracker matter list

Find, Update, or Report on Add-in Matters

1. In Tracker, go to **Matters > Matter List** in the left navigation.
2. Use advanced search to select **Matter Type > Outlook Add-in**.
3. Open the matter and edit matter profile and matter options as needed. We recommend that you at least check the default add-in template settings:
   - Firm access
   - Lead Co Person

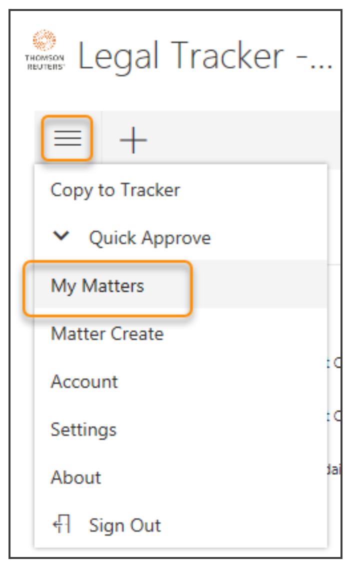
4. To report on matters that were added by using the add-in, in the Report Builder Matters Report, filter by **Matter Type > Outlook Add-in**.

CLONE A MATTER

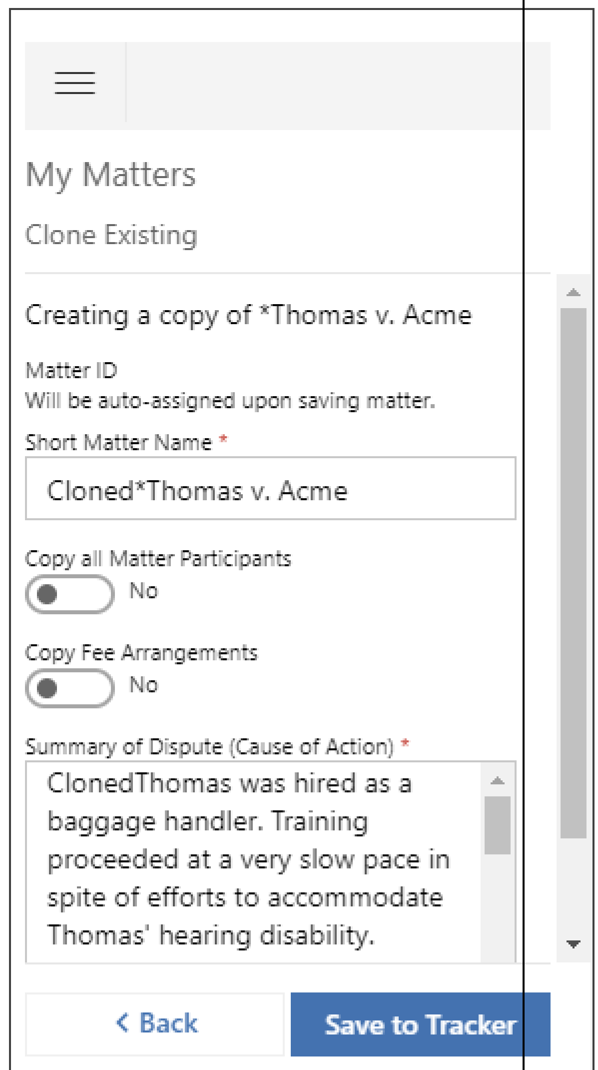
Users with Matter Create permission in Tracker can use the add-in create a new matter by cloning an existing one. Cloned matters are available immediately in the add-in and in Tracker.

Workflows

Select a Matter to Clone

1. In Outlook, select any email. 2. Click the Tracker icon to open the add-in pane.	
3. In the add-in pane, click the Menu icon, and then select **My Matters.** 4. Select a matter from the **All Matters**, **Recent**, or **Favorites** tab, or search for the matter by name, ID, or type/template.	

Create the Cloned Matter

<table>
<tr><td>1. Click the Clone Matter icon .</td><td></td></tr>
<tr><td>2. On the Clone Existing page, update values as needed for the new matter.</td><td rowspan="2">
</td></tr>
<tr><td>3. Click Save to Tracker.
4. On the Status page, confirm that the New Matter Created message displays.</td></tr>
</table>

QUICK APPROVE

The Tracker Add-in has a Quick Approve workflow that allows users to quickly review and approve, reject or dispute pending invoices from the Outlook reading pane.

Approval Requirements

- Approving invoices in the add-in requires the same permissions as approving invoices in Tracker.
- Invoice approvers can load invoices from an invoice approval email in Outlook, or all of their pending invoices in Tracker (the add-in will load the first 100).
- Companies can set a Quick Approve threshold in Tracker. This threshold is the maximum invoice amount (in $USD) that can be approved by using the add-in.
- Some pending invoices may not be eligible for Quick Approve, such as invoices that:
    - Exceed the Quick Approve threshold
    - Have incomplete tasks or audit exceptions
    - Are pending another user's approval

Workflows

Load Pending Invoices

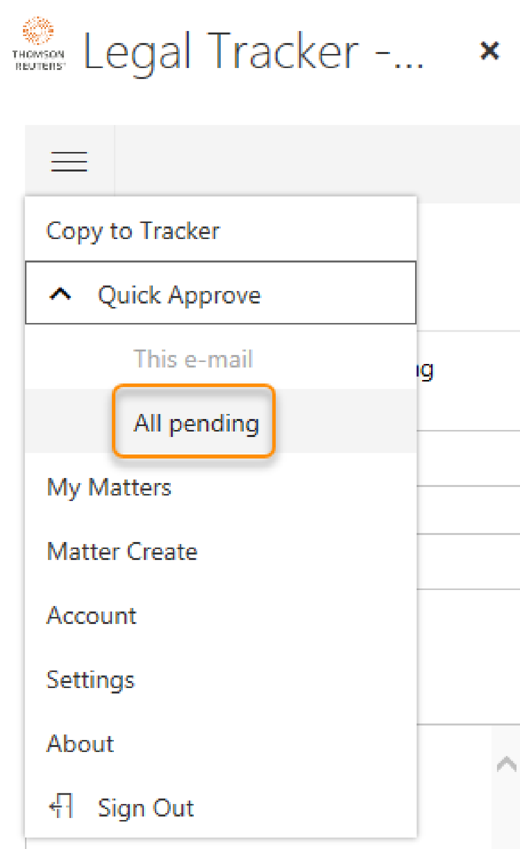
Select the invoices you want to approve by using either of these methods.

To approve invoices from an invoice approval email:

1. In Outlook, select an invoice approval email.
2. Click the Tracker icon to open the add-in pane.
3. The add-in loads all invoices listed in the current email.

To approve all of your pending invoices in Tracker:

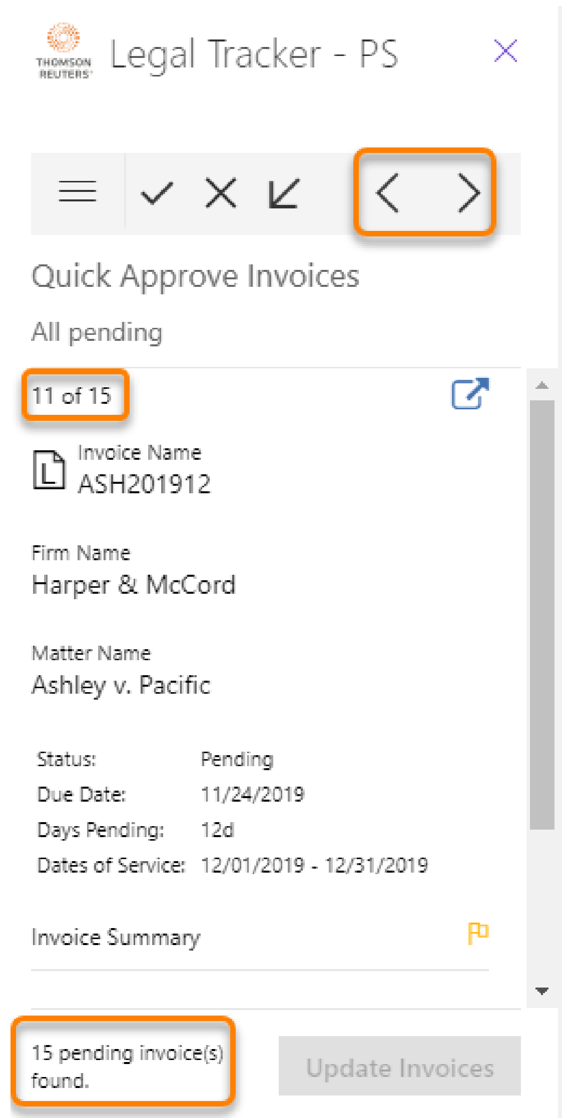
1. In Outlook, select an email.
2. Click the Tracker icon to open the add-in pane.
3. In the add-in pane, click the add-in Menu icon, and then select Quick Approve > All Pending.
4. The add-in loads all of your pending invoices from Tracker (up to 100). The total number of invoices loaded is shown at the bottom of the add-in pane.



Review invoice details and select invoices to approve

1. Review the first invoice card. If multiple invoices are loaded, use the left/right arrows on the add-in navigation bar to move between pending invoice cards and find the ones you want to approve.
2. Check the invoice details for conditions that may prevent invoice approval.

Tip | If the Approve icon is dimmed, the invoice isn't eligible for Quick Approve. It may have audits that need to be cleared in Tracker, or it may exceed the quick-approve threshold.



Approve, reject, or dispute invoices

If the invoice doesn't require action in Tracker or exceed the Quick Approve threshold:

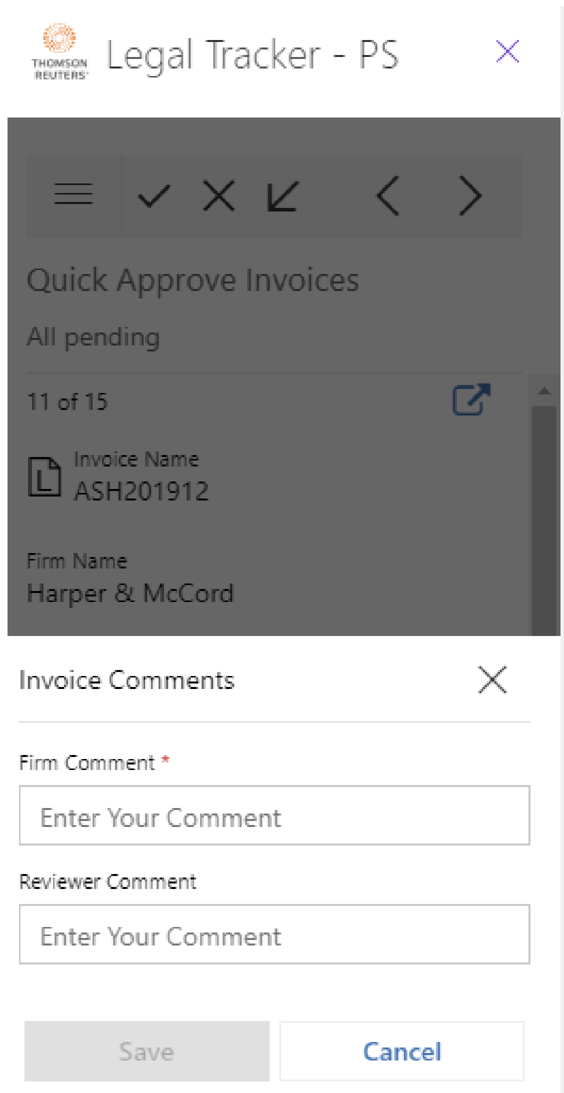
1. Use the add-in navigation bar to approve, reject, or dispute the invoice.
2. Once you perform any of the actions below, the status of the invoice is updated to 'Action pending (e.g. 'Dispute pending').

Approve the invoice.

Reject the invoice. Enter and save Firm Comments (required) and Reviewer Comments (optional).

Dispute the invoice. Enter and save Firm (required) and Reviewer (optional) invoice comments.

Tip | After you select an invoice action, an Undo icon displays on the navigation bar. If you change your mind about the invoice before you click **Update Invoices**, click Undo go to back one step.



3. When you have finished approving invoices, click **Update Invoices** to process the actions for the selected invoices in Tracker.
4. On the Status page, review the actions and errors and determine what further action, if any, is required.

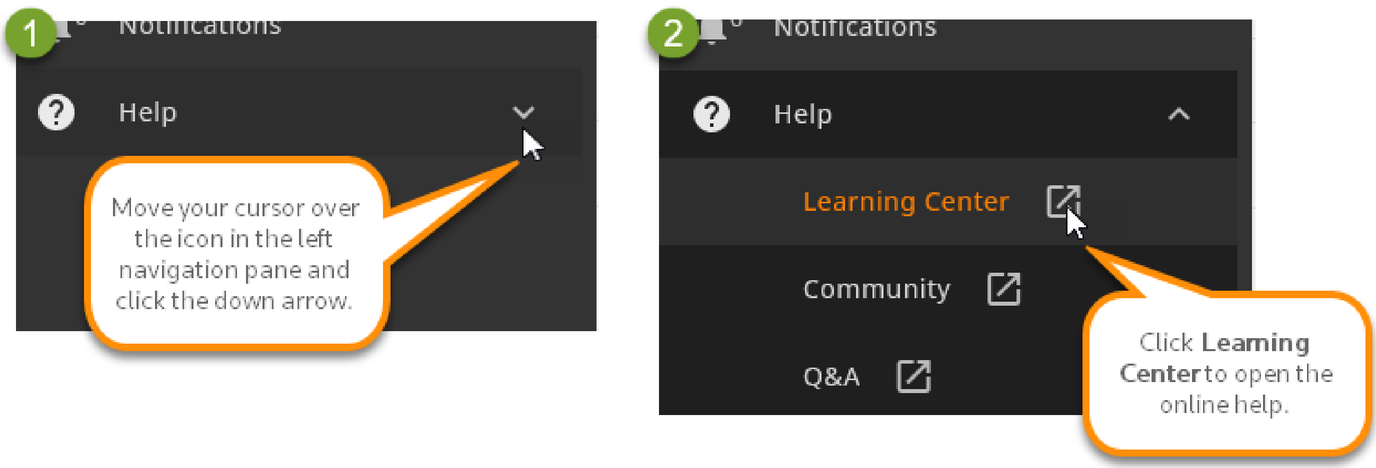
If the invoice requires action in Tracker or exceeds the Quick Approve threshold:

1. Open it in Tracker by clicking the View in Tracker icon on the invoice details card.
2. Follow your usual Tracker invoice approval workflow.

ADDITIONAL RESOURCES

ONLINE HELP

Comprehensive user documentation is available on the Tracker Help Center. To open help, scroll to the bottom of the left navigation pane. On the **Help** menu, select **Learning Center**.



Online help has detailed step-by-step instructions on the tasks you perform in Tracker.

Additional page-specific help is available on selected pages in Tracker. When available, click **Page help** at the top of a Tracker page to access specific information for the page you are on.